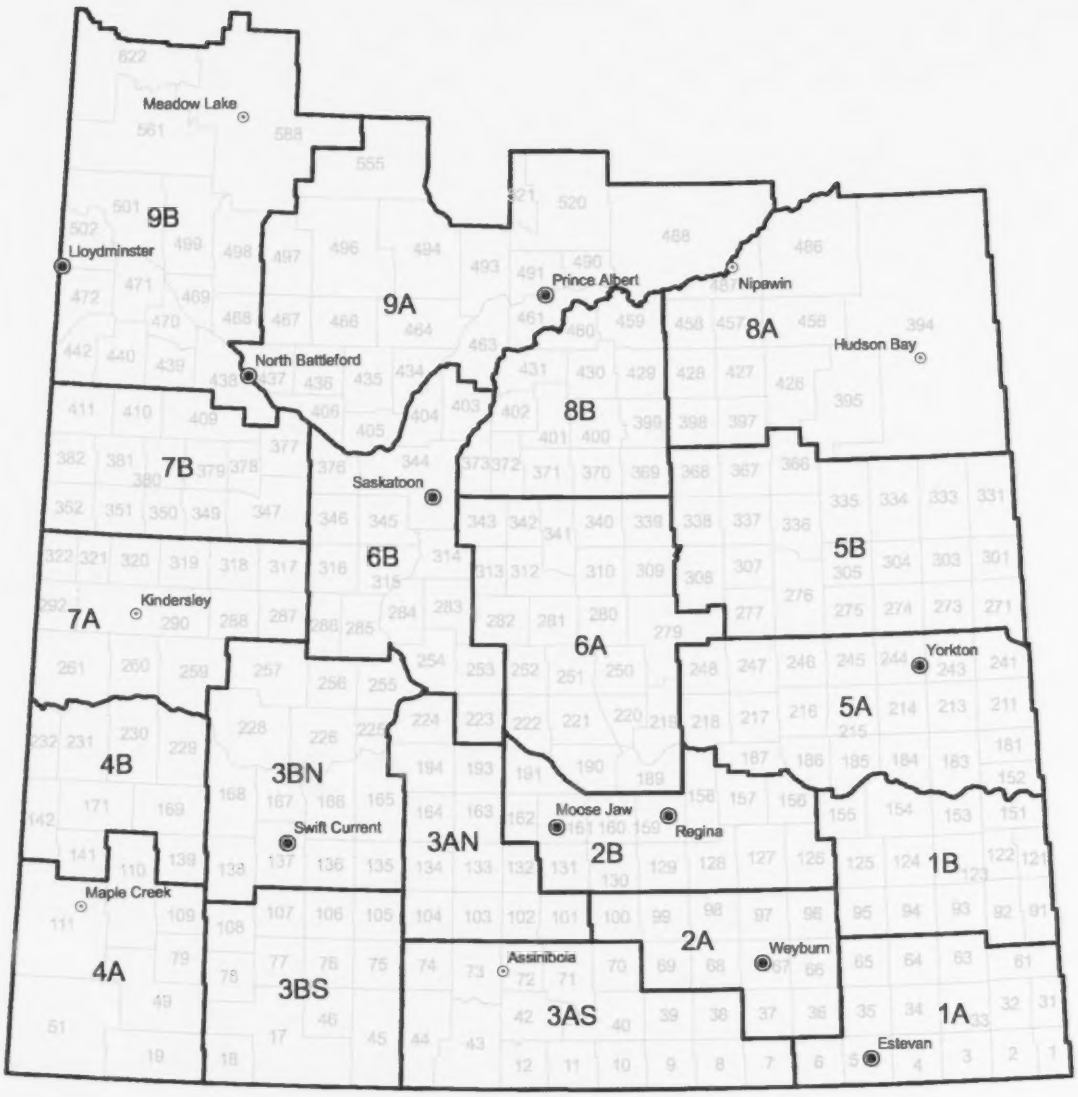
2013 SPECIALTY CROP REPORT

AGRICULTURE

STATISTICS

Government of Saskatchewan

Saskatchewan Crop Districts



Acknowledgements

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2013 Specialty Crop Report

Summary

The snow came early, stayed late, and broke records in some areas. There was a lot of concern about when fieldwork might actually get started, as farmers dug their implements out of snow banks. However, farmers in south western and west central areas of the province were able to get seeding in late April/early May, and, according to the province's Crop Report, 98 per cent of the crop had been seeded by June 20, comparable to 2012.

The main diseases affecting specialty crops included root rot, foot rot, anthracnose and blight. Insect pressure was low in many areas and for most crops in the spring, due to the extended winter and cool, wet conditions in most of Saskatchewan. Bertha armyworm caused damage in pea crops. The range of pea leaf weevil continues to move eastward in southern regions. The most intensive feeding is in the southwest, but evidence of weevil feeding was noted in west central areas. The eastern edge of the pea leaf weevil range appears to be about midway between Swift Current and Moose Jaw and the southern edge extends to near the U.S. border.

According to Crop Report records, the largest amount of cumulative rainfall in the province from April 1 to mid-October was near Bengough at 566 mm. The Oxbow area came in second at 500 mm and the McCord area third with 499 mm. The least amount of cumulative rainfall for the province was recorded around the Tramping Lake area in the northwest at 135 mm. The Langham area recorded 167 mm, while the Smiley area recorded 175 mm.

Harvest weather was favourable for most of the province, allowing producers to pull off well-above-average yields and above-average crop quality. Some

Figure 1: Area, Yield, and Production of Specialty Crops, Saskatchewan

	2013				2012			
	Area		Yield	Production	Area		Yield	Production
Crop	Seeded	Harvested		'000	Seeded	Harvested		'000
	'000 acres	'000 acres	lb/ac	tonnes	'000 acres	'000 acres	lb/ac	tonnes
Brown Mustard	100.0	100.0	1,053	47.8	65.0	65.0	851	25.1
Yellow Mustard	130.0	130.0	874	51.5	130.0	130.0	677	39.9
Oriental & Non-specified Mustard	40.0	38.0	1,044	18.0	45.0	45.0	867	17.7
Total Mustard	**270.0**	**268.0**	**965**	**117.3**	**240.0**	**240.0**	**760**	**82.7**
Large Green Lentils	870.0	860.0	1,653	645.0	1,200.0	1,190.0	1,325	715.3
Small Green Lentils	245.0	240.0	1,554	169.2	260.0	258.0	1,430	167.3
Red Lentils	1,155.0	1,140.0	1,863	963.4	900.0	880.0	1,375	548.8
Other Lentils	40.0	40.0	1,385	25.1	70.0	70.0	1,210	38.4
Total Lentils	**2,310.0**	**2,280.0**	**1,743**	**1,802.7**	**2,430.0**	**2,398.0**	**1,350**	**1,469.8**
Green Peas	340.0	335.0	2,355	357.9	325.0	317.0	1,799	258.7
Yellow Peas	1,845.0	1,815.0	2,507	2,064.3	2,250.0	2,190.0	1,802	1,790.5
Other Peas	40.0	35.0	2,400	38.1	25.0	23.0	1,840	19.2
Total Peas	**2,225.0**	**2,185.0**	**2,482**	**2,460.3**	**2,600.0**	**2,530.0**	**1,802**	**2,068.4**
Desi Chickpeas & Non-specified	45.0	45.0	1,950	39.8	20.0	20.0	1,907	17.3
Kabuli Chickpeas	135.0	133.0	2,148	129.6	160.0	158.0	1,785	127.9
Total Chickpeas	**180.0**	**178.0**	**2,097**	**169.4**	**180.0**	**178.0**	**1,800**	**145.2**
Hairless Canary Seed	60.0	60.0	1,142	31.1	120.0	120.0	1,000	54.4
Regular Canary Seed	140.0	140.0	1,382	87.7	215.0	205.0	1,025	95.3
Total Canary Seed	**200.0**	**200.0**	**1,310**	**118.8**	**335.0**	**325.0**	**966**	**149.7**
Soybeans	**170.0**	**160**	**1,631**	**118.4**	**75.0**			**n.a.**
Triticale	**25.0**	**15.0**	**1,867**	**12.7**	**20.0**	**15.0**	**2,425**	**16.5**
Hemp	**25.0**			**n.a.**	**19.0**			**n.a.**
Dry Beans	**14.0**			**n.a.**	**11.0**			**n.a.**
Coriander	**14.0**			**n.a.**	**15.5**			**n.a.**
Camelina	**2.0**			**n.a.**	**1.0**			**n.a.**
Fababeans	**8.0**			**n.a.**	**6.0**			**n.a.**
Borage	**6.0**			**n.a.**	**4.2**			**n.a.**
Caraway	**5.5**			**n.a.**	**6.5**			**n.a.**
Caranata	**5**			**n.a.**	**6**			**n.a.**
Buckwheat	**3.2**			**n.a.**	**4.0**			**n.a.**
Fenugreek	**2.5**			**n.a.**	**1.0**			**n.a.**
Total	**5,465.2**	**5,286.0**		**4,799.6**	**5,954.2**	**5,686.0**		**3,932.3**

Source: Statistics Canada and Saskatchewan Ministry of Agriculture

areas in the south eastern and east central regions experienced significant rainfall throughout the growing and harvest seasons, resulting in some yield and quality loss. The north western and west central areas were the driest in the province at the end of harvest.

In spite of the challenges faced in the spring, and because of the favourable weather and rainfall during flowering, farmers were able to harvest an exceptional crop.

Saskatchewan farmers planted fewer acres of specialty crops in 2013, at 5.5 million, down by eight per cent from 2012, as detailed in Figure 1 and shown in Figure 2. The crops that decreased in acreage from 2012 were oriental and non-specified mustard, all lentils other than red, yellow peas, Kabuli chickpeas, canary seed, caraway, coriander and caranata. All other seeded acreage increased from or stayed the same as 2012.

In aggregate, 2013 specialty crop production was the highest ever, and producers harvested crops of generally above average quality. Production of all specialty crops is estimated at 4.8 million metric tonnes (mmt), up 22 per cent from 2012 production of 3.9 mmt. Aggregate production of the specialty crops may be seen in Figures 1 and 3. Production of Desi and non-specified chickpeas more than doubled from 2012, other pea production almost doubled and brown mustard production was up over 90 per cent.

Provincial yields for all specialty crops in 2012 and 2013 are listed in Figure 1. All crops, except for triticale, showed yield increases from 2012, ranging from 14 to 60 per cent.

Figure 2: Saskatchewan Specialty Crop Seeded Area, 1992-2013

Source: Statistics Canada

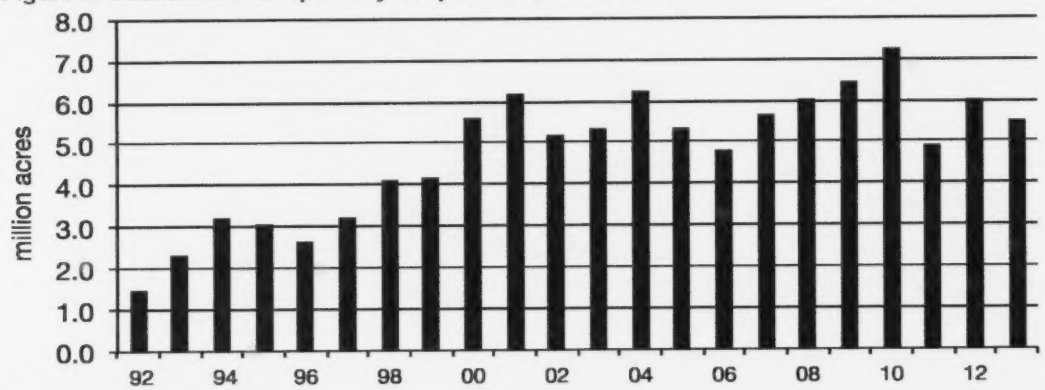
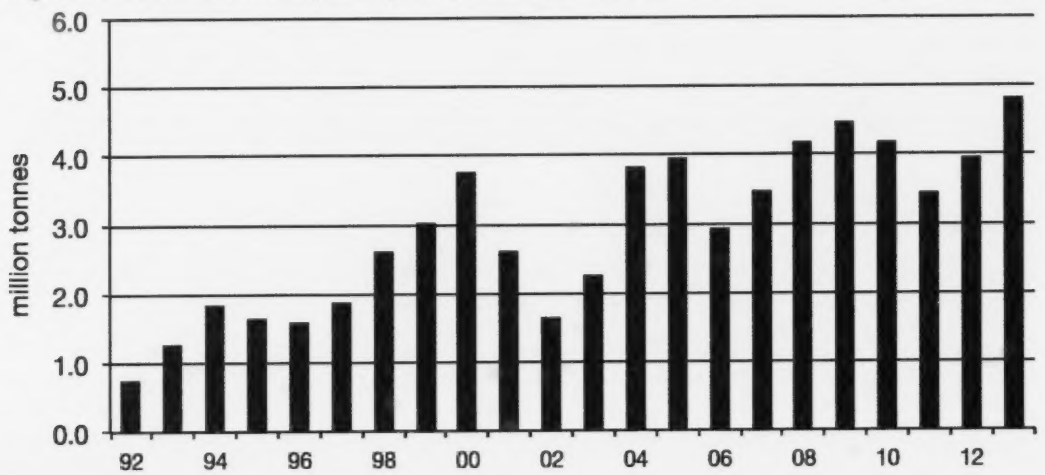


Figure 3: Saskatchewan Specialty Crop Production, 1992-2013

Source: Statistics Canada



Peas

For 2013, the estimated total pea production in Saskatchewan is 2.5 mmt, which is up 19 per cent from 2012 production. The change in pea production was a result of an increase in yield by almost 40 per cent as seeded acres were lower than in 2012. In 2013, the estimated seeded area for all peas was 2.2 million acres, down 14 per cent from a year earlier. The provincial pea yield in 2013 averaged 2,482 pounds per acre (41.4 bu.), up 38 per cent from the 2012 pea yield, and 32 per cent above the 10-year provincial average. In 2013, the pea crop is expected to grade 97 per cent in the top two grades, compared to a 10-year average of 86 per cent. A summary of the production and prices for all peas in the past 10 years is shown in Figure 4.

Figure 5 shows the acres seeded to peas by crop district in 2012. The data is not yet available by crop district for 2013. Districts with the highest seeded acres in 2012 were 7B with 263,800 acres, 3BN with 249,200, and CD 6A with 212,100 seeded acres. Crop District 3AS was in the top three in 2012 instead of 3BN.

Green Peas

Saskatchewan green pea production is estimated to be 357,900 tonnes in 2013, up 38 per cent from 2012. The green pea harvested acres increased by six per cent from 2012. Yields averaged 2,355 pounds per acre, up 31 per cent from 2012.

Figure 4: Pea Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (bu/acre)	Production (tonnes)	Average Price ($/tonne)
2003/04	2,145	22.5	1,292,700	167
2004/05	2,375	36.2	2,291,500	139
2005/06	2,550	34.0	2,313,400	121
2006/07	2,430	28.7	1,861,500	166
2007/08	2,925	29.5	2,309,600	258
2008/09	3,165	32.5	2,725,600	251
2009/10	2,875	33.8	2,612,700	196
2010/11	2,610	29.8	1,973,100	234
2011/12	1,700	36.4	1,671,100	314
2012/13	2,600	30.0	2,068,400	316
2013/14	2,225	41.4	2,460,300	

Source: Statistics Canada

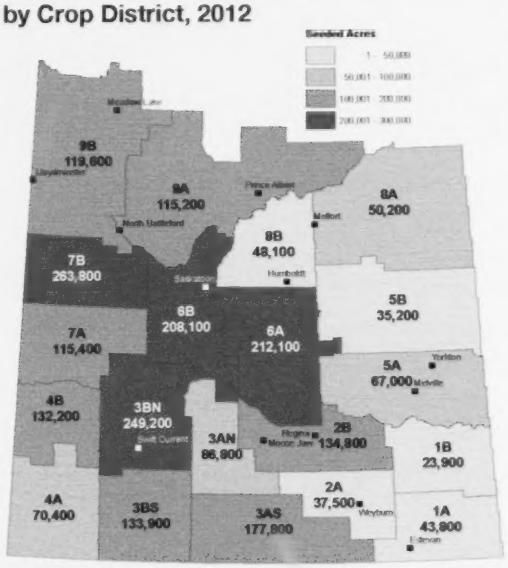
The spot price at Saskatchewan plants at the beginning of the 2012/13 crop year was $371 per tonne. The spot price generally rose to reach $642 by late May, then started falling and was at $476 per tonne by the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 6.

Yellow Peas

Saskatchewan yellow pea production is estimated to be 2.1 mmt in 2013. Production is up 15 per cent from 2012 levels. The yellow pea harvested area decreased by 17 per cent from 2012. The yields averaged 2,507 pounds per acre, up 39 per cent from 2012.

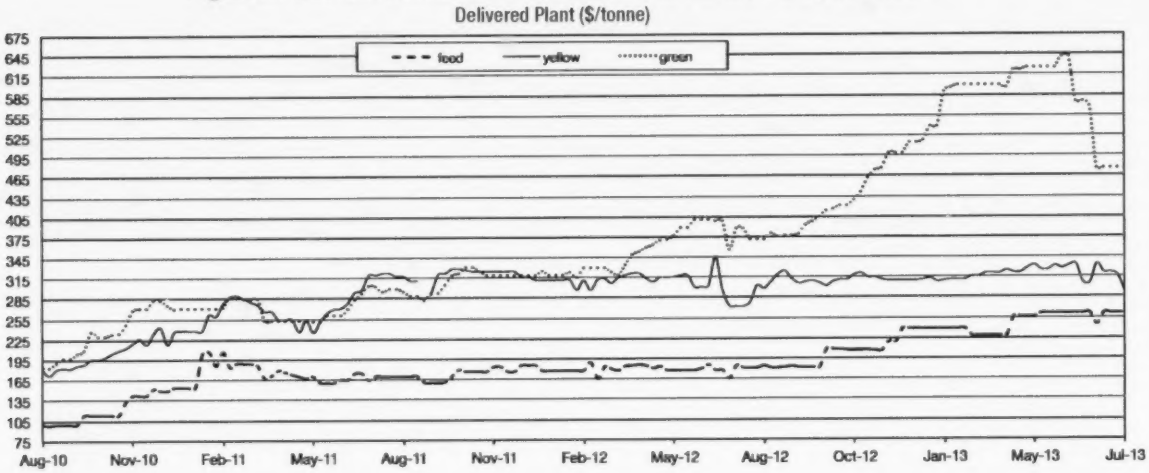
The spot price at Saskatchewan plants in the beginning of the 2012/13 crop year was $298 per tonne. The spot price rose to reach $324 per tonne in late August, dropped to $302 per tonne in early October, rose to $321 by early November, fell as low as $309 by late January, varied to a high of $334 per tonne by mid-June and again in early July, then started falling and was at $294 per tonne by the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 6.

Figure 5: Pea Seeded Acres by Crop District, 2012



Source: Statistics Canada

Figure 6: Saskatchewan Green, Yellow and Feed Pea Spot Price



Source: Saskatchewan Ministry of Agriculture

Feed Peas

Saskatchewan production of 'other pea', which included marrowfat peas and maple peas, is estimated to be 38,100 tonnes, up almost double from 2012. Yields averaged 2,400 pounds per acre, up 31 per cent from 2012.

The spot price at Saskatchewan plants in the beginning of the 2012/13 crop year was $184 per tonne. The spot price fluctuated to reach $209 per tonne by early October, then fell slightly through to the end of November before starting to rise again. The spot price reached $239 by mid-December and stayed there until late February. Then, the spot price fell through to early April before rising again to reach $261 in early May where it generally stayed until it closed out the crop year at the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 6.

Canadian exports of all peas were 2.1 million tonnes in 2011/12 and rose by 27 per cent to 2.7 million tonnes in 2012/13. Figure 7 shows the Canadian exports of all peas to different regions of the world. In 2012, Saskatchewan was responsible for 37 per cent of the value of the peas exported in the world.

Figure 8 shows the supply and disposition of peas in Western Canada. The figure shows that the ending stocks to use ratio was at five per cent in the 2012/13 crop year, and is estimated to rise to 14 per cent by the end of the 2013/14 crop year due to higher production in 2013/14.

Figure 7: Canadian Dry Peas Exports

Top 20 Destinations by Crop Year

	2011-2012		2012-2013	
		tonnes		tonnes
	World	2,095,693	World	2,651,090
1	India	917,965	India	1,004,961
2	China	651,302	China	750,280
3	Bangladesh	156,357	Bangladesh	433,987
4	Cuba	66,000	United States	95,945
5	United States	54,276	Spain	53,153
6	Indonesia	31,132	Cuba	48,016
7	Colombia	30,741	Belgium	34,769
8	Venezuela	23,411	United Arab Emirates	24,295
9	Phillipines	19,755	Colombia	21,694
10	United Arab Emirates	19,264	Indonesia	16,324
11	Spain	13,909	Venezuela	14,869
12	Peru	13,808	Ireland	13,589
13	Taiwan	10,900	Phillipines	12,281
14	Mexico	7,546	Brazil	12,090
15	Japan	6,383	Taiwan	11,759
16	Yemen	6,053	Peru	7,785
17	South Africa	5,284	Nepal	7,306
18	Chile	4,890	Pakistan	6,206
19	Trinidad & Tobago	4,619	Yemen	5,216
20	Brazil	4,426	Kenya	5,209

Source: Statistics Canada

Figure 8: Pea Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres				'000 tonnes					
2005/06	473.0	3,130.0	2,993.6	75.3	3,541.9	2,567.4	23.0	212.2	376.3	363.0	11%
2006/07	363.0	3,041.0	2,519.9	59.9	2,942.8	1,969.2	23.0	247.0	536.6	167.0	6%
2007/08	167.0	3,565.0	2,934.8	37.6	3,139.4	2,201.6	23.0	271.8	388.7	255.0	9%
2008/09	255.0	3,895.0	3,564.5	15.1	3,834.6	2,825.6	25.0	255.8	283.2	445.0	13%
2009/10	445.0	3,675.0	3,379.4	55.0	3,879.4	2,177.9	25.0	246.6	519.9	910.0	31%
2010/11	910.0	3,432.0	3,018.2	32.9	3,961.1	3,012.0	25.0	165.8	223.3	535.0	16%
2011/12	535.0	2,407.0	2,502.0	11.7	3,048.7	2,095.7	27.7	227.3	403.0	295.0	11%
2012/13	295.0	3,645.0	3,340.8	16.1	3,651.9	2,651.1	25.9	229.3	571.6	174.0	5%
2013/14	174.0	3,240.0	3,849.3	15.0	4,038.3	2,780.0	27.0	230.0	500.0	501.3	14%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Lentils

For 2013, the estimated total lentil production in Saskatchewan is 1.8 mmt, which is up 23 per cent from the 2012 lentil production. The increase in lentil production was a result of a higher yield. In 2013 the estimated seeded area for all lentils was 2.3 million acres, down five per cent from 2012. The provincial lentil yield in 2013 averaged 1,743 pounds per acre, a 29 per cent increase from the 2012 yield and 41 per cent above the 10-year provincial average. A summary of the production and prices for all lentils in the past 10 years is shown in Figure 9. In 2013, the lentil crop is expected to grade 89 per cent in the top two grades, compared to the 10-year average of 76 per cent.

Figure 10 shows the acres seeded to lentils by crop district in 2012. The data is not yet available by crop district for 2013. Districts with the highest seeded acres in 2012 were 3BN with 514,700, 7A with 323,500, and 2B with 286,100 seeded acres. Crop district 2B replaced 3AN from 2012 as one of the top three.

Large Green Lentils

Saskatchewan large green lentil production is estimated to be 645,000 tonnes in 2013, down 10 per cent from 2012. Harvested acres decreased by 28 per cent from 2012. Yields averaged 1,653 pounds per acre, up 25 per cent from 2012.

The spot price at Saskatchewan plants in the beginning of the 2012/13 crop year was 21.03¢ per pound. The spot price varied to land at 23.09¢ per pound by late September, fell to 19.73¢ per pound by early February, rallied to 25.25¢ per pound by late May and then fell again to 23.10¢ at the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 11.

Small Green Lentils

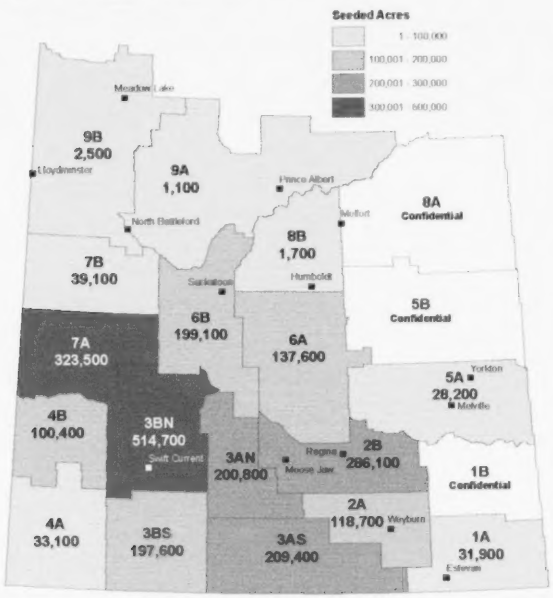
Saskatchewan small green lentil production is estimated to be 169,200 tonnes in 2013, up one per cent from 2012 production. Harvested acres decreased by six per cent from 2012 and yields averaged 1,554 pounds per acre, up nine per cent from last year.

Figure 9: Lentil Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2003/04	1,250	862	475,000	423
2004/05	1,800	1,143	902,700	368
2005/06	1,960	1,320	1,150,200	249
2006/07	1,400	1,115	692,800	296
2007/08	1,435	1,136	733,900	502
2008/09	1,745	1,330	1,043,200	754
2009/10	2,355	1,413	1,496,800	661
2010/11	3,340	1,321	1,922,800	498
2011/12	2,460	1,384	1,497,500	474
2012/13	2,430	1,351	1,469,800	454
2013/14	2,310	1,743	1,802,700	

Source: Statistics Canada

Figure 10: Lentil Seeded Acres by Crop District, 2012



Source: Statistics Canada
Confidential Data withheld because of small sample size

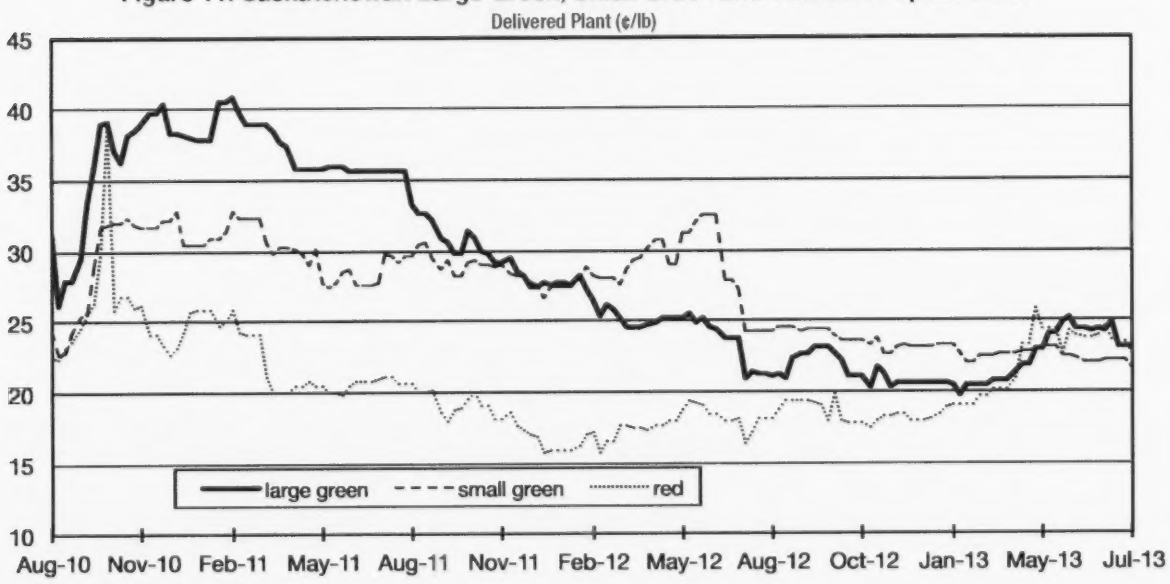
The spot price at Saskatchewan plants at the beginning of the 2012/13 crop year was 24.17¢ per pound. The spot price rose to 24.56¢ per pound by mid-August, then fell to 22.65¢ per pound by late November, rose to 23.31¢ per pound by mid-December varied a bit to land at 22.03¢ per pound by mid-February, rose to 23.13¢ per pound by early May, and fell to 21.61¢ per pound by the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 11.

Red Lentils

Saskatchewan red lentil production is estimated to be 963,400 tonnes in 2013, up by 76 per cent from 2012. In 2013, 1.1 million acres of red lentils were harvested, up 30 per cent from 2012. Yields averaged 1,863 pounds per acre, up 36 per cent from the 1,375 pounds per acre in 2012.

The spot price at Saskatchewan plants at the beginning of the 2012/13 crop year was 18.16¢ per pound. The spot price rose to 19.39¢ per pound by late August, generally fell to 17.45¢ by the beginning of November, rose to 25.82¢ per pound by early April, and fluctuated to land at 22.72¢ per pound by the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 11.

Figure 11: Saskatchewan Large Green, Small Green and Red Lentil Spot Prices



Source: Saskatchewan Ministry of Agriculture

Figure 12: Canadian Lentil Exports

Top 20 Destinations by Crop Year

	2011-2012	tonnes	2012-2013	tonnes
	World	1,147,733	World	1,637,743
1	Turkey	206,308	India	624,682
2	India	169,504	Turkey	169,371
3	United Arab Emirates	83,483	United Arab Emirates	110,657
4	Pakistan	68,527	Bangladesh	90,800
5	Colombia	65,226	Algeria	80,982
6	Egypt	64,905	Colombia	64,346
7	Algeria	63,564	Spain	57,962
8	Bangladesh	47,627	Egypt	53,550
9	Venezuela	40,609	Sri Lanka	50,587
10	Spain	40,487	Pakistan	30,961
11	Mexico	40,264	Mexico	28,952
12	Peru	30,172	Peru	27,828
13	United States	27,480	Venezuela	26,784
14	Italy	22,652	United States	22,334
15	Chile	15,956	Ecuador	21,377
16	Ecuador	15,513	Italy	16,595
17	Sri Lanka	14,715	Brazil	16,283
18	Germany	11,458	Chile	16,260
19	Brazil	11,217	Germany	10,907
20	United Kingdom	11,196	France	10,268

Source: Statistics Canada

Other Lentils

'Other lentils' include medium green and French green varieties. The Saskatchewan 'other lentils' production is estimated to be 25,100 tonnes in 2013, down by 35 per cent from 2012. In 2012, 40,000 acres of 'other lentils' were harvested, down 43 per cent from 2012. 'Other lentils' yields averaged 1,385 pounds per acre, up 15 per cent from 2012.

At the end of July 2013, the spot price for medium green lentils was 17.30¢ per pound and the spot price for French green lentils was 22.50¢ per pound, both down from the opening of the crop year.

Canadian exports of all lentils were 1.1 million tonnes in 2011/12 but increased by 43 per cent to 1.6 million tonnes in 2012/13. Figure 12 shows the Canadian exports of all lentils to different regions of the world. In 2012, Saskatchewan accounted for 47 per cent of the value of world lentil exports.

Figure 13 shows the supply and disposition of lentils in Western Canada. The table shows that the ending stocks to use ratio was 14 per cent in the 2012/13 crop year and is estimated to rise in the 2013/14 crop year due increased production and decreased exports.

Figure 13: Lentil Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	000 tonnes	'000 acres	'000 tonnes								
2005/06	242.0	1,940.0	1,164.3	7.6	1,413.9	671.3	4.0	47.6	206.0	485.0	52%
2006/07	485.0	1,370.0	692.8	12.8	1,190.6	851.7	4.0	48.8	87.1	199.0	20%
2007/08	199.0	1,425.0	733.9	8.8	941.7	810.5	4.0	59.4	21.8	46.0	5%
2008/09	46.0	1,730.0	1,043.2	7.2	1,096.4	973.0	6.9	81.8	12.7	22.0	2%
2009/10	22.0	2,385.0	1,530.2	8.2	1,560.4	1,386.8	6.0	117.2	10.4	40.0	3%
2010/11	40.0	3,312.0	2,004.8	28.5	2,073.3	1,104.8	6.0	87.0	45.5	830.0	67%
2011/12	830.0	2,482.8	1,573.5	11.4	2,414.9	1,147.7	8.0	85.6	313.6	860.0	55%
2012/13	860.0	2,481.0	1,537.9	8.7	2,406.6	1,637.7	10.4	83.5	375.0	300.0	14%
2013/14	300.0	2,358.0	1,880.5	8.0	2,188.5	1,625.0	11.0	80.0	140.0	332.5	18%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Mustard

For 2013, the estimated total mustard production in Saskatchewan is 117,300 tonnes, up 42 per cent from 2012 mustard production. The increase in production was a result of increased seeded acres and higher yields. In 2013 the estimated seeded area for all mustard was 270,000 acres, up 13 per cent from 2012. The provincial average yield in 2013 was 965 pounds per acre, up 27 per cent from the 2012 yield, and 24 per cent above the 10-year provincial average. In 2013, the crop is expected to grade 86 per cent No. 1 Canada, above the 10-year average of 74 per cent. A summary of the production and prices for all mustard in the past 10 years is shown in Figure 14.

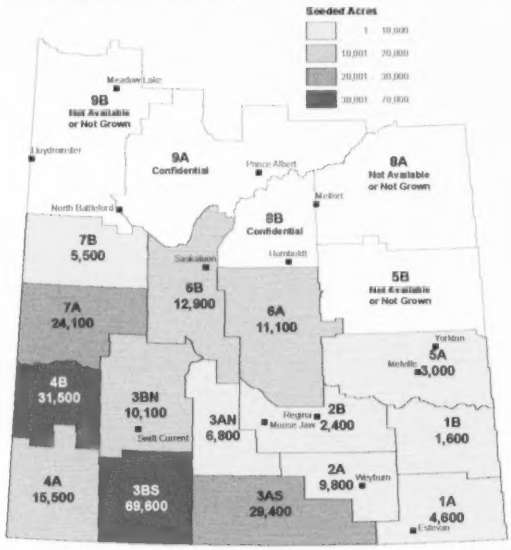
Figure 14: Mustard Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2003/04	675	600	176,900	464
2004/05	600	898	232,800	389
2005/06	400	863	152,700	300
2006/07	268	700	82,600	356
2007/08	375	560	95,300	689
2008/09	370	770	123,900	930
2009/10	405	885	160,600	660
2010/11	370	846	134,300	537
2011/12	265	892	103,200	654
2012/13	240	760	82,700	665
2013/14	270	965	117,300	

Source: Statistics Canada

Figure 15 shows the acres seeded to by crop district in 2012. The data is not yet available by crop district for 2013. Districts with the highest seeded acres in 2012 were 3BS with 69,600, 4B with 31,500, and 3AS with 29,400 seeded acres. Crop districts 6A and 7A were in the top three instead of 4B and 3AS in 2011.

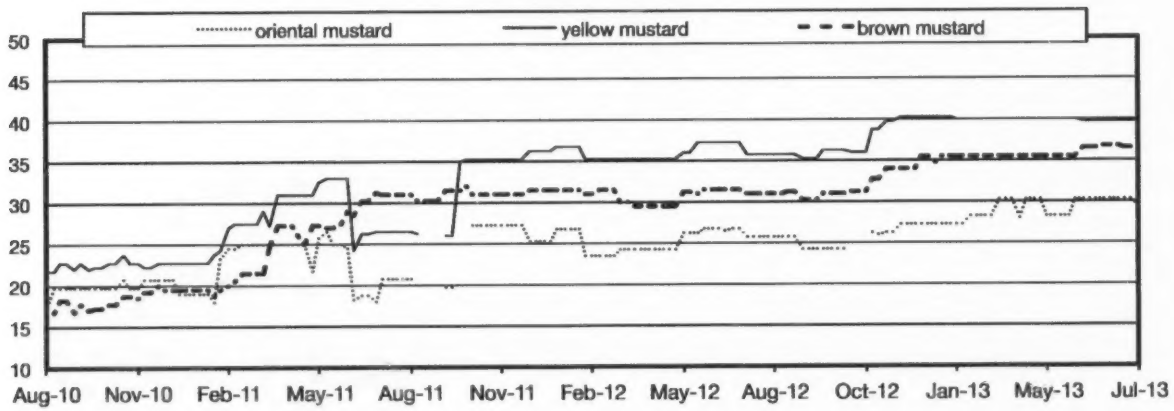
Figure 15: Mustard Seeded Acres by Crop District, 2012



Source: Statistics Canada

Figure 16: Saskatchewan Brown, Yellow and Oriental Mustard Spot Price

Delivered Plant (¢/lb)



Source: Saskatchewan Ministry of Agriculture

Figure 17: Canadian Mustard Exports

Top 20 Destinations by Crop Year

	2011-2012		2012-2013
	tonnes		tonnes
	World	115,187	World	120,040
1	United States	61,716	United States	59,437
2	Belgium	19,357	Germany	14,458
3	Germany	7,918	Belgium	14,016
4	Japan	5,247	Netherlands	7,693
5	Thailand	3,688	Japan	5,467
6	Netherlands	2,608	France	2,881
7	Korea, South	2,010	Venezuala	1,925
8	Senegal	1,706	Senegal	1,907
9	Venezuala	1,561	Korea, South	1,387
10	Switzerland	1,437	Switzerland	1,195
11	Brazil	896	Australia	956
12	Australia	881	Poland	913
13	United Kingdom	716	Brazil	754
14	France	690	United Kingdom	745
15	Peru	597	Thailand	717
16	Ecuador	486	Greece	690
17	Greece	351	Sri Lanka	664
18	Guatemala	337	Bolivia	554
19	Finland	330	Morocco	382
20	India	310	Peru	365

Source: Statistics Canada

Yellow Mustard

Saskatchewan yellow mustard production is estimated to be 51,500 tonnes in 2013, up 29 per cent from the 2012 production. Harvested acres stayed the same as 2012. Yields averaged 874 pounds per acre, up 29 per cent from 2012.

The spot price at Saskatchewan plants at the beginning of the 2012/13 crop year was 35.83¢ per pound. The spot price fell to 35.25¢ by late August, then started generally rising again and reached 40.25¢ per pound by early December and stayed at that price for eight weeks. The price then started falling slowly to reach 39.75¢ by early June and closed out the crop year at that price. The cash/spot price for the past three crop years is shown in Figure 16.

Brown Mustard

Saskatchewan brown mustard production is estimated to be 47,800 tonnes in 2013. Production is up 90 per cent from the 2012 production. Harvested acres increased by 54 per cent from 2012. Yields averaged 1,053 pounds per acre, up 24 per cent from 2012.

The spot price at Saskatchewan plants at the beginning of the 2012/13 crop year was 31.08¢ per pound. The spot price quickly rose, then fell to 30.23¢ per pound by late August, then generally rose to 36.75¢ per pound by late June, and closed at 36.42¢ per pound by July 31, 2013. The cash/spot price for the past three crop years is shown in Figure 16.

Figure 18: Mustard Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres	'000 tonnes								
2005/06	191.0	465.0	183.8	0.2	375.0	133.1	18.0	1.5	32.4	190.0	103%
2006/07	190.0	320.0	108.2	1.3	299.5	152.9	20.5	2.1	33.0	91.0	44%
2007/08	91.0	460.0	124.8	0.4	216.2	168.2	8.0	2.1	10.9	27.0	14%
2008/09	27.0	455.0	161.1	0.9	189.0	130.8	3.6	2.4	10.2	42.0	29%
2009/10	42.0	515.0	208.3	0.3	250.6	128.0	13.7	2.1	24.8	82.0	49%
2010/11	82.0	450.0	182.0	0.5	264.5	123.5	10.0	1.5	13.5	116.0	78%
2011/12	116.0	317.5	130.0	0.5	246.5	115.2	31.1	1.5	15.7	83.0	51%
2012/13	83.0	333.0	118.6	1.3	202.9	120.0	27.5	1.6	17.8	36.0	22%
2013/14	36.0	360.0	154.5	0.5	191.0	120.0	30.0	1.5	15.0	24.5	15%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Oriental Mustard

For 2013, the estimate of "oriental or unspecified mustard" production in Saskatchewan is 18,000 tonnes, up two per cent from 2012. Harvested area was down by 16 per cent while yields were up by 21 per cent.

The spot price of oriental mustard at Saskatchewan plants at the beginning of the 2012/13 crop year was 25.70¢ per pound. The spot price generally fell to 24.33¢ per pound by mid-September, started rising in November, up to as high as 30.25¢ by mid-April, dropped a bit, then fluctuated close the crop year at 29.27¢ per pound in July 2013. The cash/spot price for the past three crop years is shown in Figure 16.

Canadian exports of all mustard were 115,187 tonnes in 2011/12 and increased by four per cent to 120,040 tonnes in 2012/13. Figure 17 shows the Canadian exports of all mustard to different regions of the world. In 2012, Saskatchewan was responsible for 26 per cent of the value of the world's mustard seed exports.

Figure 18 shows the supply and disposition of all mustard in Western Canada. The table shows that the stocks to use ratio was 22 per cent in the 2012/13 crop year and is estimated to drop to 15 per cent by the end of the 2013/14 crop year due to lower beginning stocks.

Canary Seed

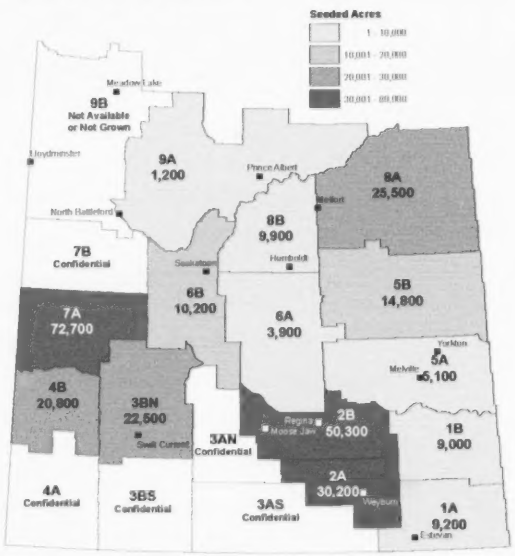
For 2013, the estimated total canary seed production in Saskatchewan is 118,800 tonnes, which is down 21 per cent from 2012. The decline in canary seed production was a result of a decline in seeded acres. In 2013 the estimated seeded area was 200,000 acres, down 40 per cent from 2012. The 2013 provincial yield averaged 1,310 pounds per acre, up 36 per cent from 2012 and up 35 per cent from the 10-year provincial average. A summary of the production and prices for canary seed in the past 10 years is shown in Figure 19.

Figure 19: Canary Seed Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2003/04	570	782	198,700	379
2004/05	820	836	284,400	268
2005/06	435	1,099	219,300	201
2006/07	326	904	129,100	333
2007/08	425	827	155,700	525
2008/09	390	1,071	184,600	498
2009/10	355	1,224	188,700	402
2010/11	365	890	143,200	546
2011/12	275	1,050	128,600	592
2012/13	335	1,015	149,700	585
2013/14	200	1,310	118,800	

Source: Statistics Canada

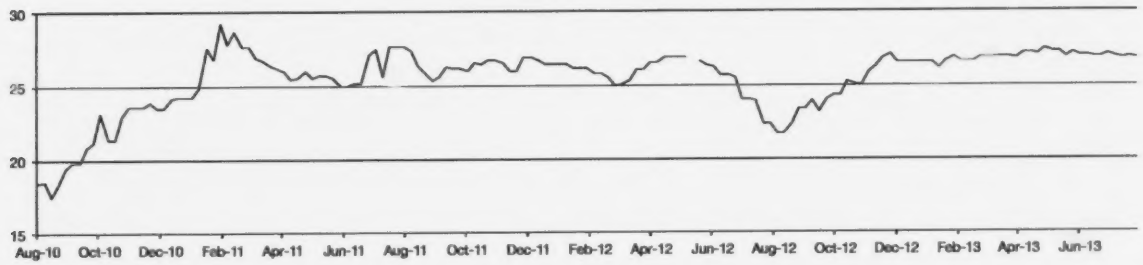
Figure 20: Canary Seed Seeded Acres by Crop District, 2012



Source: Statistics Canada
Confidential Data withheld because of small sample size

Figure 21: Saskatchewan Canary Seed Spot Price

Delivered Plant (¢/lb)



Source: Saskatchewan Ministry of Agriculture

Figure 22: Canadian Canary Seed Exports

Top 20 Destinations by Crop Year

	2011-2012		2012-2013
	tonnes		tonnes
	World	126,386	World	136,771
1	Belgium	25,339	Mexico	36,894
2	Mexico	22,665	Belgium	22,511
3	United States	10,559	Colombia	12,304
4	Spain	9,672	United States	11,320
5	Colombia	8,809	Spain	9,312
6	Italy	5,354	Brazil	6,415
7	Venezuala	4,171	Indonesia	4,064
8	Portugal	4,170	Portugal	3,960
9	Peru	4,165	Italy	3,791
10	Brazil	3,482	Peru	3,078
11	Chile	2,598	Chile	2,341
12	Algeria	2,458	Turkey	2,147
13	Turkey	2,301	Egypt	1,340
14	Indonesia	2,111	Tunisia	1,191
15	Egypt	1,886	Ecuador	1,157
16	Ecuador	1,545	Guatemala	1,151
17	Tunisia	1,504	Taiwan	1,044
18	UAE	1,445	Japan	1,042
19	Morocco	1,054	Algeria	979
20	Syria	997	Greece	911

Source: Statistics Canada

Figure 20 shows the acres seeded to canary seed by crop district in 2012. The data is not yet available by crop district for 2013. Districts with the highest seeded acres in 2012 were 7A with 72,700, 2B with 50,300 and 2A with 30,200 seeded acres. Last year crop district 3BN had more acres planted to canary seed than 2A did.

The spot price at Saskatchewan plants at the beginning of the 2012/13 crop year was 22.35¢ per pound. The spot price fell slightly, then rose to 27.12¢ per pound by late November, fell to 26.16¢ per pound by mid-January, and generally rose again to 27.47¢ per pound by early May. The spot price was 26.78¢ per pound by the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 21.

Seventy per cent of the seeded area was to regular canary seed, while 30 per cent was to hairless canary seed. Regular canary seed out-yielded hairless canary seed by 21 per cent.

Canadian exports of canary seed were 126,386 tonnes in 2011/12 and increased by eight per cent to 136,771 tonnes in 2012/13. Figure 22 shows the Canadian exports of all canary seed to different regions of the world. In 2012, Saskatchewan was responsible for 58 per cent of the value of the world canary seed exports.

Figure 23 shows the supply and disposition of canary seed in Western Canada. The figure shows that the ending stocks to use ratio was 15 per cent in the 2012/13 crop year and is estimated to fall to nine per cent by the end of the 2013/14 crop year due mainly to lower production.

Figure 23: Canary Seed Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres	'000 tonnes								
2005/06	168.0	450.0	227.2	-	395.2	185.2	5.0	5.9	9.1	190.0	93%
2006/07	190.0	324.0	133.1	-	323.1	177.9	5.0	7.7	12.5	120.0	59%
2007/08	120.0	430.0	162.5	-	282.5	204.2	2.0	7.2	4.1	65.0	30%
2008/09	65.0	400.0	195.0	-	260.0	152.6	5.0	6.5	18.9	77.0	42%
2009/10	77.0	355.0	197.4	-	274.4	181.3	5.0	6.9	12.2	69.0	34%
2010/11	69.0	380.0	153.5	-	222.5	178.8	3.0	4.8	5.9	30.0	16%
2011/12	30.0	270.0	128.6	-	158.6	126.4	4.0	5.2	6.0	17.0	12%
2012/13	17.0	325.0	149.7	0.1	166.8	136.8	2.0	2.9	3.1	22.0	15%
2013/14	22.0	200.0	118.8	-	140.8	120.0	3.0	3.0	3.0	11.8	9%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Chickpeas

For 2013, the estimated total chickpea production in Saskatchewan is 169,400 tonnes, up 17 per cent from 2012 production. In 2013 the estimated seeded area for all chickpeas was 180,000 acres, the same as 2012. The provincial chickpea yield in 2013 averaged 2,097 pounds per acre, up 17 per cent from 2012 and 54 per cent above the 10-year provincial average. In 2013, the crop is expected to grade 48 per cent No. 1 CW versus the 10-year average of 44 per cent. A summary of the production and prices for all chickpeas in the past 10 years is shown in Figure 24.

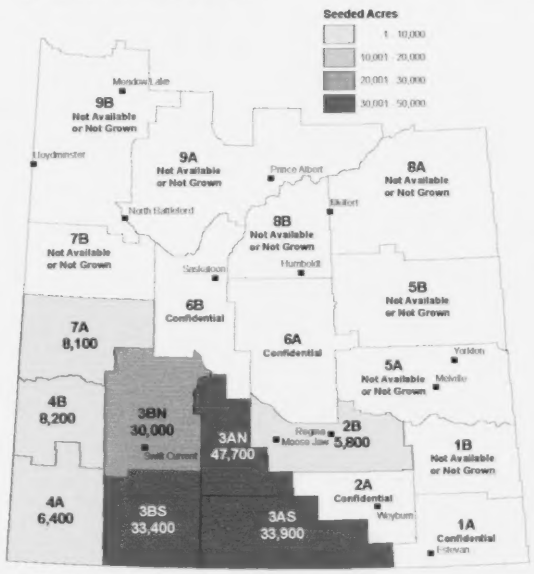
Figure 24: Chickpea Production and Prices in Saskatchewan

	Seeded Area '000 acres	Yield (lbs/acre)	Production (tonnes)	Average Price ($/tonne)
2003/04	130	923	54,400	508
2004/05	100	1,175	42,600	389
2005/06	165	1,240	84,300	623
2006/07	278	1,100	137,200	630
2007/08	380	1,149	198,100	639
2008/09	110	1,409	67,000	592
2009/10	80	1,689	57,400	601
2010/11	205	1,489	128,300	642
2011/12	105	1,610	75,200	750
2012/13	180	1,798	145,200	623
2013/14	180	2,097	169,400	

Source: Statistics Canada

Figure 25 shows the acres seeded to chickpeas by crop district in 2012. The data is not yet available by crop district for 2013. Districts with the highest seeded acres in 2012 were 3AN with 47,700, 3AS with 33,900 and 3BS with 33,400 seeded acres. These are the same top three areas as in 2012.

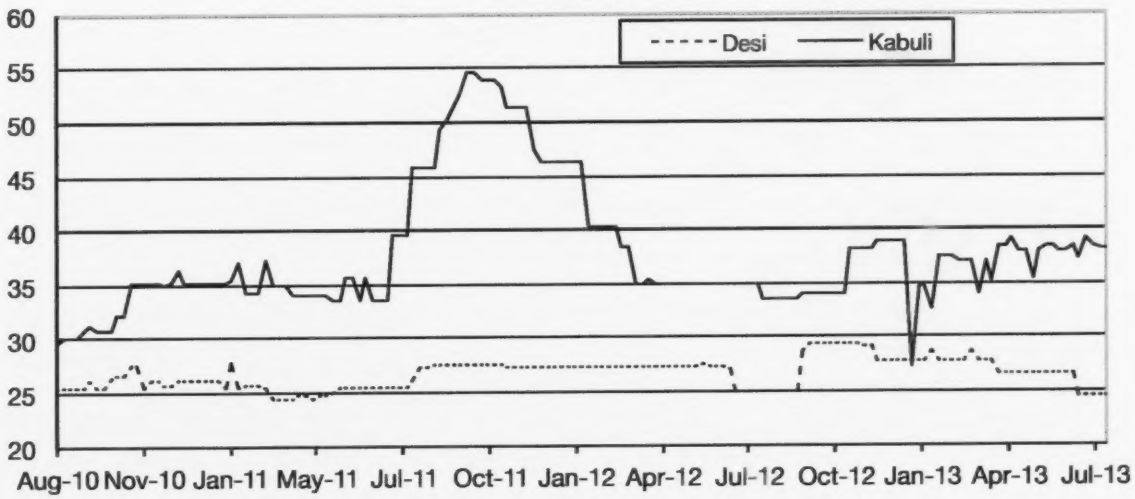
Figure 25: Chickpea Seeded Acres by Crop District, 2012



Source: Statistics Canada
Confidential Data withheld because of small sample size

Figure 26: Saskatchewan Kabuli and Desi Chickpea Spot Prices

Delivered Plant (¢/lb)



Source: Saskatchewan Ministry of Agriculture

Figure 27: Canadian Chickpea Exports

Top 20 Destinations by Crop Year

	2011-2012	tonnes	2012-2013	tonnes
	World	36,610	World	68,524
1	United States	8,178	United States	11,738
2	Pakistan	4,177	Turkey	9,122
3	India	3,533	Pakistan	5,667
4	Jordan	3,154	United Arab Emirates	5,422
5	United Arab Emirates	2,600	Italy	3,802
6	United Kingdom	2,171	Spain	3,268
7	Italy	1,512	Israel	3,218
8	Israel	1,200	United Kingdom	3,170
9	Trinidad & Tobago	1,113	Jordan	2,798
10	Egypt	1,063	Morocco	2,510
11	Lebanon	588	Egypt	2,256
12	Spain	445	Tunisia	1,719
13	Algeria	304	Colombia	1,625
14	Venezuela	250	Lebanon	1,256
15	Netherlands	230	Trinidad & Tobago	1,209
16	Belgium	210	India	1,173
17	Ecuador	191	Saudi Arabia	898
18	Costa Rica	144	Chile	700
19	Dominican Republic	129	Netherlands	629
20	Syria	108	Dominican Republic	600

Source: Statistics Canada

Kabuli Chickpea

Saskatchewan Kabuli chickpea production is estimated to be 129,600 tonnes in 2013, up one per cent from 2012. In 2013, 133,000 acres of Kabuli chickpea were harvested, down 16 per cent from 2012. Yields averaged 2,148 pounds per acre, up 20 per cent from 2012.

The spot price at Saskatchewan plants at the beginning of the 2012/13 crop year was 35.05¢ per pound. The spot price dropped to 33.58¢ per pound right away and stayed there until mid-September, then began to rise and was 38.80¢ per pound at the beginning of December staying there for a month before fluctuating to 39.10¢ per pound in late April. Then there were some more fluctuations until the spot price reached 38.10¢ per pound by the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 26.

Desi Chickpea

For 2013, the estimated Desi chickpea and "other or unspecified chickpeas" production was 39,800 tonnes, up more than double from 2012. Harvested area was up more than double while yields increased two per cent over 2012.

The spot price for Saskatchewan plants at the beginning of the 2012/13 crop year was 25.07¢ per pound. In mid-September, the spot price started to rise and reached 29.38¢ per pound by late September, then eventually fell back to 27.88¢ per pound by early December. There were some fluctuations, but generally the price fell to reach 24.60¢ per pound by the end of July 2013. The cash/spot price for the past three crop years is shown in Figure 26.

Canadian exports of chickpeas were 36,610 tonnes in 2011/12 and increased by 87 per cent to 68,524 tonnes in 2012/13. Figure 27 shows the Canadian exports of all chickpeas to different regions of the world. In 2012, Saskatchewan was responsible for two per cent of the value of world exports.

Figure 28 shows the supply and disposition of chickpeas in Western Canada. The figure shows that the ending stocks to use ratio was 42 per cent in the 2012/13 crop year and is estimated to further rise to 55 per cent by the end of the 2013/14 crop year, due to increased production and a larger previous-year carryover.

Figure 28: Chickpea Supply and Disposition, Western Canada

	Aug 1 Stocks	Harvested Area	Production	Imports	Total Supply	Exports	Domestic Use	Seed	F.W.D.*	July 31 Stocks	Stocks/ Use
	'000 tonnes	'000 acres	'000 tonnes								
2005/06	42.0	180.0	103.9	6.8	152.7	64.0	20.0	20.3	31.4	17.0	13%
2006/07	17.0	315.0	163.2	5.0	185.2	115.2	14.0	27.3	18.7	10.0	6%
2007/08	10.0	430.0	224.8	8.4	243.2	68.5	16.0	7.0	59.7	92.0	61%
2008/09	92.0	105.0	67.0	4.1	163.1	53.0	19.1	6.7	22.3	62.0	61%
2009/10	62.0	100.0	75.5	5.9	143.4	65.6	20.5	13.0	24.3	20.0	16%
2010/11	20.0	190.0	128.3	9.3	157.6	85.8	30.0	7.5	12.3	22.0	16%
2011/12	22.0	115.5	85.6	8.7	116.3	36.6	30.0	11.4	27.3	11.0	10%
2012/13	11.0	198.0	161.4	8.9	181.3	68.5	24.7	13.0	21.1	54.0	42%
2013/14	54.0	178.0	169.4	8.0	231.4	85.0	31.0	13.0	20.0	82.4	55%

* Feed, waste and dockage
Source: Saskatchewan Ministry of Agriculture estimates based on data from Statistics Canada, Agriculture and Agri-Food Canada (AAFC) and STAT Market Research.

Other Crops

Soybean production is estimated at 118,400 tonnes. Seeded acres was reported at 170,000 acres with a yield of 1,631 pounds per acre.

Triticale production is estimated at 12,700 tonnes, down 23 per cent from 2012 production of 16,500 tonnes. The decrease is due to a 23 per cent decrease in yield. The average yield for triticale was 1,867 pounds per acre. In 2013, 45 per cent of the triticale crop is expected to grade No. 1 Canada, compared with a ten-year average of 71 per cent.

Coriander seeded area was down from 2012, with around 14,000 acres planted. In 2012/13, Canadian exports to the world were 4,295 tonnes. The United States was the main importer followed by Sri Lanka and Trinidad and Tobago.

Hemp, at 25,000 acres, is estimated to be higher than what was planted in 2012. Dry bean acreage is estimated to be slightly higher than 2012 at 14,000 acres planted. Camelina acres doubled from 2012 to 2,000 acres – half contracted and half company-produced. Organic camelina is currently priced at 40 cents a pound while non-organic is 20 cents a pound. Borage seeded area is estimated to be higher than in 2012, with 6,000 acres planted. Caraway seeded area was estimated to be down compared to 2012, with 5,500 acres planted. Caranata dropped about 1,000 acres from 2012 to 5,000 acres. Fababean, at 8,000 acres, are up somewhat from 2012, and fenugreek, at 2,500 acres, is estimated to be higher than the 2012 level.

Other crops grown include buckwheat, sunflowers, and quinoa.

Figure 29: Prairie Provinces Specialty Crops Area, Production, and Canadian Exports

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Mustard										
					Seeded Area (thousand acres)					
Alberta	130.0			85.0	100.0	120.0	100.0	63.0	95.0	95.0
Saskatchewan	600.0	400.0	268.2	375.0	370.0	405.0	370.0	265.0	240.0	270.0
Manitoba	8.0									
Prairie Provinces	**738.0**	**400.0**	**268.2**	**460.0**	**470.0**	**525.0**	**470.0**	**328.0**	**335.0**	**365.0**
					Production (thousand tonnes)					
Alberta	51.2	31.1	25.6	29.5	37.2	47.7	47.7	26.8	35.9	37.2
Saskatchewan	232.8	152.7	82.6	95.3	123.9	160.6	134.3	103.2	82.7	117.3
Manitoba	2.7									
Prairie Provinces	**286.7**	**183.8**	**108.2**	**124.8**	**161.1**	**208.3**	**182.0**	**130.0**	**118.6**	**154.5**
					Canadian Exports					
	04/05	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	**12/13**	
'000 tonnes	119.0	133.1	152.9	168.2	130.8	128.0	123.5	115.2	120.0	
Chickpeas										
					Seeded Area (thousand acres)					
Alberta	15.0	30.0	40.7	50.0		25.0		12.5	20.0	
Saskatchewan	100.0	165.0	278.2	380.0	110.0	80.0	205.0	105.0	180.0	180.0
Manitoba										
Prairie Provinces	**115.0**	**195.0**	**318.9**	**430.0**	**110.0**	**105.0**	**205.0**	**117.5**	**200.0**	**180.0**
					Production (thousand tonnes)					
Alberta	8.6	19.6	26.0	26.7		18.1		10.4	16.2	
Saskatchewan	42.6	84.3	137.2	198.1	67.0	57.4	128.3	75.2	145.2	169.4
Manitoba										
Prairie Provinces	**51.2**	**103.9**	**163.2**	**224.8**	**67.0**	**75.5**	**128.3**	**85.6**	**161.4**	**169.4**
					Canadian Exports					
	04/05	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	**12/13**	
'000 tonnes	46.6	64.0	115.2	68.5	53.0	65.6	85.8	36.6	68.5	
Lentils										
					Seeded Area (thousand acres)					
Alberta	18.0	24.0				50.0	105.0	97.8	85.0	83.0
Saskatchewan	1,800.0	1,960.0	1,400.0	1,435.0	1,745.0	2,355.0	3,340.0	2,460.0	2,430.0	2,310.0
Manitoba	7.0									
Prairie Provinces	**1,825.0**	**1,984.0**	**1,400.0**	**1,435.0**	**1,745.0**	**2,405.0**	**3,445.0**	**2,557.8**	**2,515.0**	**2,393.0**
					Production (thousand tonnes)					
Alberta	11.3	14.1				33.4	82.0	76.0	68.1	77.8
Saskatchewan	902.7	1,150.2	692.8	733.9	1,043.2	1,496.8	1,922.8	1,497.5	1,469.8	1,802.7
Manitoba	1.8									
Prairie Provinces	**915.8**	**1,164.3**	**692.8**	**733.9**	**1,043.2**	**1,530.2**	**2,004.8**	**1,573.5**	**1,537.9**	**1,880.5**
					Canadian Exports					
	04/05	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	**12/13**	
'000 tonnes	450.9	671.3	851.7	810.5	973.0	1,386.8	1,104.8	1,147.7	1,637.7	

Figure 29: Prairie Provinces Specialty Crops Area, Production, and Canadian Exports

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Peas										
					Seeded Area (thousand acres)					
Alberta	640.0	555.0	587.3	610.0	710.0	800.0	935.0	706.7	1,075.	1,000.
Saskatchewan	2,375.0	2,550.0	2,430.5	2,925.0	3,165.0	2,875.0	2,610.0	1,700.0	2,600.0	2,225.0
Manitoba	150.0	110.0	91.4	95.0	110.0	85.0	80.0	30.0	55.0	60.0
Prairie Provinces	**3,165.0**	**3,215.0**	**3,109.2**	**3,630.0**	**3,985.0**	**3,760.0**	**3,625.0**	**2,436.7**	**3,730.0**	**3,285.0**
					Production (thousand tonnes)					
Alberta	642.3	617.5	552.6	527.5	731.4	666.7	982.5	805.6	1,208.4	1,321.3
Saskatchewan	2,291.5	2,313.4	1,861.5	2,309.6	2,725.6	2,612.7	1,973.1	1,671.1	2,068.4	2,460.3
Manitoba	160.0	56.9	103.5	97.7	107.5	100.0	62.6	25.3	64.0	67.7
Prairie Provinces	**3,093.8**	**2,987.8**	**2,517.6**	**2,934.8**	**3,564.5**	**3,379.4**	**3,018.2**	**2,502.0**	**3,340.8**	**3,849.3**
					Canadian Exports					
	04/05	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	**12/13**	
'000 tonnes	1,853.0	2,567.4	1,969.2	2,201.6	2,825.6	2,177.9	3,012.0	2,095.7	2,651.1	
Canary Seed										
					Seeded Area (thousand acres)					
Alberta	10.0									
Saskatchewan	820.0	435.0	326.2	425.0	390.0	355.0	365.0	275.0	335.0	200.0
Manitoba	30.0	20.0	9.0	15.0	20.0	15.0	30.0			
Prairie Provinces	**860.0**	**455.0**	**335.2**	**440.0**	**410.0**	**370.0**	**395.0**	**275.0**	**335.0**	**200.0**
					Production (thousand tonnes)					
Alberta	4.7									
Saskatchewan	284.4	219.3	129.1	155.7	184.6	188.7	143.2	128.6	149.7	118.8
Manitoba	11.4	7.9	4.0	6.8	10.4	8.7	10.3			
Prairie Provinces	**300.5**	**227.2**	**133.1**	**162.5**	**195.0**	**197.4**	**153.5**	**128.6**	**149.7**	**118.8**
					Canadian Exports					
	04/05	**05/06**	**06/07**	**07/08**	**08/09**	**09/10**	**10/11**	**11/12**	**12/13**	
'000 tonnes	163.1	185.2	177.9	204.2	152.6	181.3	178.8	126.4	136.8	

Source: Statistics Canada

Notes

Notes

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